October 15, 2019

By Hand Delivery
Ms. Lora W. Johnson, CMC, LMMC
Clerk of Council
Council of the City of New Orleans
Room 1E09, City Hall
1300 Perdido Street
New Orleans, LA 70112

Re: In Re: 2018 Triennial Integrated Resource Plan of Entergy New Orleans, LLC
Docket No. UD-17-03

Dear Ms. Johnson:

Entergy New Orleans, LLC respectfully submits its October 29, 2019 Public Technical Meeting Materials in the above referenced Docket. Please file an original and two copies into the record in the above referenced matter, and return a date-stamped copy to our courier.

Should you have any questions regarding the above, I may be reached at (504) 576-2984. Thank you for your assistance with this matter.

Sincerely,

Harry M. Barton

HMB/bkd
Enclosures
cc: Official Service List (via email)
AGENDA

- Introductions
- Technical Meeting #5 Recap
- RFP & Implementation Plan Timeline
- Proposed PY10-12 DR Offerings
- Third Party Administration, Implementation and Evaluation Team
- Proposed PY 10-12 Demand Response Program Offerings
  - Residential
  - Commercial & Industrial
- Potential Studies Review
- Questions & Discussion
Technical Meeting #5 was held September 11, 2019
- Proposed new energy efficiency offerings under two scenarios
- Briefly discussed demand response offerings to come
- Mentioned the RFP for Commercial Demand Response
  - Issued 7/24/2019
  - 5 Respondents
- Energy Efficiency topics not discussed
  - Green Light New Orleans
  - Evaluation, Measurement and Verification
# Commercial Demand Response RFP Timeline

<table>
<thead>
<tr>
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<tr>
<td>RFP Issued</td>
<td>July 24, 2019</td>
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<tr>
<td>Bids Submitted</td>
<td>August 21, 2019</td>
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<tr>
<td>Technical Meeting with Advisors and Stakeholders</td>
<td>September 11, 2019</td>
</tr>
<tr>
<td>Oral Presentations</td>
<td>September 17-19, 2019</td>
</tr>
<tr>
<td>Winners Notified</td>
<td>October 1, 2019</td>
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## ENERGY SMART IMPLEMENTATION TIMELINE

<table>
<thead>
<tr>
<th>Implementation Plan Timeline</th>
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<tr>
<td>Technical Meeting #6</td>
<td>October 29, 2019</td>
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<tr>
<td>File Implementation Plan</td>
<td>November 22, 2019</td>
</tr>
<tr>
<td>Program Year 10 Begins</td>
<td>January 1, 2020</td>
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ENERGY SMART DEMAND RESPONSE PROGRAM TEAM

<table>
<thead>
<tr>
<th>Third-Party Administrator</th>
<th>Third-Party Implementers</th>
<th>Third-Party Evaluator</th>
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<tr>
<td>APTIM</td>
<td>APTIM</td>
<td>ADM Associates</td>
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<tr>
<td>Honeywell*</td>
<td>Franklin Energy</td>
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<td></td>
<td>EnergyHub*</td>
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<tr>
<td></td>
<td>Honeywell*</td>
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<td></td>
<td>Enbala*</td>
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<td></td>
<td>ILSI Engineering</td>
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*Indicates a new program vendor
PROPOSED PY10-12 DR OFFERINGS
PY10-12 PROPOSED OFFERINGS

- **Residential Offerings – Aptim/Energy Hub**
  - Direct Load Control Switches (DLC)
  - Bring-Your-Own-Thermostat (BYOT)

- **Commercial & Industrial Offerings**
  - Small Commercial & Industrial - Aptim/Energy Hub
  - Large Commercial & Industrial – Honeywell/Enbala
RESIDENTIAL DEMAND RESPONSE
APTIM/ ENERGYHUB
OVERVIEW & OBJECTIVES

- Continue to leverage the DLC switch population while tapping into the growing base of connected thermostats installed in the ENO territory
- Leverage technical integrations with DLC switches and thermostat manufacturers to enroll, monitor, and control the residential aggregation for peak demand reduction
- Dispatch DR events via duty cycling (DLC) or temperature offset (BYOT) using the Franklin Energy and EnergyHub platforms
- Participants receive an up-front enrollment incentive and an ongoing annual incentive for continued participation in the DLC and BYOT offerings
- Lay the foundation for future DR and DER load management programs (water heaters, EVs, solar inverters, batteries) and MISO market participation (LMR assets)
RESIDENTIAL OFFERINGS OVERVIEW

Customer Type: Residential customers

Event Strategy: Annual, Monday-Friday (non-holidays), 12-8pm, up to four hours per event. No more than three consecutive event days and no more than fifteen events per program year.

Control Strategy: Temperature setback (up to 4 degrees) with up to 90-minute pre-cool, use of Firm Load Dispatch (FLD) as applicable.

Eligibility: Entergy customers in Orleans parish with active electric service, working central AC, and one or more connected devices from an EnergyHub device partner.

Incentive: $25 enrollment incentive / $40 annual incentive.

Load Reduction Goals:

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<tr>
<th></th>
<th>2020</th>
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<th>2022</th>
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<td>BYOT 2020 Load Shed</td>
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<th>Participants</th>
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## RESIDENTIAL BUDGET & SAVINGS – BYOT & DLC SWITCHES

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BRING YOUR OWN THERMOSTAT (BYOT)

Marketing & Outreach

- EnergyHub coordinates device partner-driven digital campaigns (email, web and mobile) featuring partner and ENO branding (“Partner-centric” marketing)
- Aptim coordinates a marketing campaign focused on raising awareness of the BYOT program (“Program-centric marketing”)
BRING YOUR OWN THERMOSTAT (BYOT)

Enrollment

- Partner-centric marketing directs customers to an enrollment website to apply to the program
- Program-centric marketing directs customers to an EnergyHub-powered "microsite"
- APTIM processes enrollments in the DERMS and customers are automatically available for DR dispatch
BRING YOUR OWN THERMOSTAT (BYOT)

Participation Guidelines

- Residential customers with active electric service, working central AC, and a qualifying connected thermostat can participate
- Customers must provide basic information and accept T&Cs to apply
- ENO can notify customers of upcoming events (e.g., event date/time, duration, opt-out instructions)
- DR event parameters will be agreed upon as part of the program launch process
- Customers can opt out of DR events and contact support to unenroll from the BYOT program
**BRING YOUR OWN THERMOSTAT (BYOT)**

**Trade Ally Recruitment & Training**
- The BYOT model leverages the existing base of connected thermostats
  - Device manufacturers act as the “Tier 1” contact for device-related customer support
  - Traditional trade ally hardware installation/maintenance not required
- APTIM trains device partners on the BYOT program, and establishes routing protocols for inquiries that manufacturers cannot answer

**Installation Process & Device Management**
- Participation driven from the existing base of approximately 14,000 connected thermostats online in ENO’s service territory
- Connected thermostats installed through APTIM’s EE programs can be directly enrolled in BYOT
- The Mercury DERMS provides near real-time access to device data through device partner integrations
BRING YOUR OWN THERMOSTAT (BYOT)

Data Management & Tracking
- The DERMS dashboard provides a portfolio-level view of the DR aggregation
- DR event reporting available during and after the completion of an event for M&V and analysis
- Customer enrollment data (e.g., Accepted, Rejected, Unenrolled) and device reports are available for download on demand
- Data can be exported to APTracks

Evaluation, Measurement & Verification (EM&V)
- DR event M&V reports (e.g., participation statistics, load and load shed interval data) are available for download following the completion of an event
- APTIM can export M&V reports for offline analysis or to provide to ADM
DIRECT LOAD CONTROL (DLC) SWITCH

Marketing & Outreach
- Marketing will be passive as DLC switches will be a secondary option for customers that do not want smart thermostats or are not eligible to receive a smart thermostat
  - DLC switches will be offered in the fine print of the smart thermostat marketing
  - Targeted marketing will be executed to existing EasyCool customers providing them the option to trade their DLC switch for a smart thermostat

Enrollment & Participation
- Customers can enroll online through the program website or via phone to the call center
- Targeted campaigns for existing switch participants will be conducted through digital email, direct mail, and/or outbound calling campaign
- Customers are automatically enrolled in the EasyCool incentive program upon installation of the switch
DIRECT LOAD CONTROL (DLC) SWITCH

Installation Process & Device Management

- DLC switches are installed and serviced by field technicians
- Installation appointments are scheduled as necessary for landlord-tenant and no access projects. All other installations occur without customer attendance required (all installations are outdoors)
- Program staff manage all service and removal requests as needed
- Customers that request removal or trade the switch for the thermostat will have their devices removed, which can then be put back into inventory for future customers
Data Management & Tracking

- Implementation staff will use Efficiency Manager 2.0 to track all customer information, installation details, and incentives using a field tool known as Efficiency Clipboard
- Data is transferred to APTracks

Evaluation, Measurement & Verification (EM&V)

- ENO’s Third-Party Evaluator, ADM, conducts in-field datalogging on participating customers’ units and during events
- Results are presented to Energy Smart administration and implementation staff annually
COMMERCIAL & INDUSTRIAL DEMAND RESPONSE
OVERVIEW & OBJECTIVES

Key Objectives

- Introduce new Demand Response offerings targeting Commercial & Industrial customers of all sizes
- Support C&I customers in managing demand-based charges on their utility bill
- Expand the breadth and depth of peak demand management capabilities available to ENO
- Implement centralized online software solutions for enrollment, DR event deployment, data management, and reporting
- Offer hands-free participation for Small C&I customers (<100 kW) with supporting incentives, to encourage participation
- Present dedicated demand response expertise to offer Large C&I customers (>100 kW) tailored demand management options
SMALL COMMERCIAL & INDUSTRIAL APTIM/ ENERGYHUB
**Customer Type:** Small business customers (100 kW maximum demand)

**Event Strategy:** Annual, Monday-Friday (non-holidays), 12-8pm, up to four hours per event. No more than three consecutive event days and no more than fifteen events per program year

**Control Strategy:** Temperature setback (up to 4 degrees) with up to 90-minute pre-cool, use of Firm Load Dispatch (FLD) as applicable

**Eligibility:** Entergy customers in Orleans parish in with active electric service, working central AC, and one or more connected devices from an EnergyHub device partner

**Incentive:** $25 enrollment incentive / $40 annual incentive

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**Load Reduction Goals**

- **2020 load shed:** 0.13 MW
- **2021 load shed:** 0.40 MW
- **2022 load shed:** 0.91 MW

![Load Reduction Goals Chart]

Legend:
- 2020 load shed
- 2021 load shed
- 2022 load shed
## SMALL COMMERCIAL & INDUSTRIAL BUDGET & SAVINGS

<table>
<thead>
<tr>
<th>Small Commercial &amp; Industrial</th>
<th>EM&amp;V</th>
<th>Program Costs</th>
<th>Total Budget</th>
<th>kW Target</th>
<th>Participants</th>
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<td>$93,131</td>
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</tbody>
</table>
SMALL COMMERCIAL & INDUSTRIAL

Marketing & Outreach

- **Broad marketing objectives:** Raise awareness, Customer education, Enrollment call-to-action
- **Primary marketing tactics:** Direct mail, Bill inserts, Collateral, Digital marketing
- **Targeted segments:** Convenience stores, Eating/drinking establishments, Automotive/auto repair, Retail, Houses of worship, Grocery, Commercial offices

- Digital marketing directly from smart thermostat manufacturers to installed user base
- Trade allies, call center staff (ENO and APTIM) will receive training and be informed of marketing efforts
Enrollment & Participation

- Customer enrollment will be managed directly through the Mercury platform
- Trade allies will be encouraged to enroll customers at the time of installation
- During DR events, Mercury will automatically signal thermostats of participating customers
- Customers may opt out of DR events through manual thermostat adjustment or web/mobile apps
Enrollment & Participation

- Customers enter basic information and accept the program T&Cs
- Enrollments flow into the Mercury DERMS for review and approval
Trade Ally Recruitment & Training

- Energy Smart’s existing trade ally network will support the offering, and DR offerings will motivate new trade ally recruitment
- Pre-launch trade ally training and updated materials will support fluency of trade allies in program delivery and customer enrollment
- APTIM will enforce trade ally program standards, support trades with program assistance, and facilitate conflict resolution
Installation Process & Device Management

- Small businesses may self-install qualifying thermostats, or receive professional installation through a trade ally
- Customers will be eligible for energy efficiency incentives on qualifying thermostats, and DR incentives for initial enrollment and ongoing participation
- Inventory management not necessary, with multiple manufacturers and trade allies supporting the market
SMALL COMMERCIAL & INDUSTRIAL

**Data Management & Tracking**

- Mercury will act as the System of Record for all data collected through the Small C&I offering
- Mercury has built-in reporting, forecasting, and demand response event planning capabilities
- Data security protocols and systems access permissions will prevent malicious activity and ensure participants’ sensitive data is protected
PORTFOLIO-LEVEL REPORTING

- Summary statistics and near real-time program data
- Load and capacity forecasting for DSM decision-making
SMALL COMMERCIAL & INDUSTRIAL

Evaluation, Measurement & Verification (EM&V)

- ENO’s Third-Party-Evaluator, ADM, will have direct access to participant data (e.g., customer enrollment info, DR event reporting) in Mercury
- QA/QC will be performed on a sampling of devices installed at participating small businesses
- Program evaluation outcomes will inform forward-looking program planning
LARGE COMMERCIAL & INDUSTRIAL – HONEYWELL/ ENBALA
Honeywell Smart Energy’s solutions provide actionable insights to utilities, by connecting assets, process, people and things to harness the value of data across the ecosystem. By leveraging our relationships across our entire Honeywell portfolio of products we bring immediate value to utility clients providing quick scalability.

**Global Footprint**
- Operates in over **130** countries
- **1,000+** Utility Customers
- **5,500+** Employees

**OUR COMMITMENT**
- Trusted Partner
- Accelerate Innovation
- Security
- Industry Standard Technologies
- Proven Interoperability
- Advanced Demand Response
Customer Type: Commercial and industrial customers (greater than 100 kW demand or under automated controls.)

Duration: Program availability: Monday-Friday (non-holidays), 12-8pm, up to four hours per event. No more than three consecutive event days and no more than fifteen events annually

Control Strategy: Dependent upon load shed strategy. Signaling gateway incorporated into the site control system. HVAC, motors, industrial process, manufacturing processes, refrigeration, etc. are among the most common shed strategies

Eligibility: Entergy New Orleans customers with active electric service and functioning control architecture capable of executing load shed strategies

Incentive: $500-$4000/ annually paid in two seasonal payouts (winter/summer) Tiered incentive scale based on load shed enrolled into the program.
<table>
<thead>
<tr>
<th>Large Commercial &amp; Industrial</th>
<th>EM&amp;V</th>
<th>Program Costs</th>
<th>Total Budget</th>
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LARGE COMMERCIAL & INDUSTRIAL

Marketing and Outreach

- Direct C&I outreach
- Collaboration with ENO account managers
- Business case development
- Trade ally collaboration

**LIGHT MANUFACTURING**

- Decision maker(s) may not be the owner
- May have extended hours & high energy intensity due to processing equipment
- Understanding the business needs is crucial to relationship
- Outreach via outbound calling, local trade associations

**NATIONAL ACCOUNTS**

- Multiple facilities with similar profiles
- Typically one decision maker for all locations; may not be local
- Prefer simple programs for HVAC & lighting
- Outreach via outbound calling and trade associations
- Need direct hands-on support for program participation

**INDUSTRIAL ACCOUNTS**

- Large facility C&I, process vs. facility
- Typically decision by committee
- Comparing benefits of demand response to capital or other projects, considerate of primary purpose
- Custom programs more prevalent, due to specialty
- Outreach via collaboration with Entergy account managers
- F2F, specialty allies drive program participation
Customer Journey
- Approach customer with program opportunity
- Engineering meeting with customer / facility
- Audit facility / processes / controls
- Feasibility, curtailment planning and load shed strategy created.
- Project approved
- Coordination of installations (agnostic, trade ally, in house)
- Commissioning
- Event participation

Reduction Targets
- HVAC
- Motor loads
- Refrigeration
- Process loads
- Manufacturing loads
**ENBALA ADVANCED CONTROL SOFTWARE PROVIDES UNIQUE BENEFITS**

<table>
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<tr>
<th>Benefits</th>
<th>Details</th>
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<td>Fast dispatch of DR resources where customer constraints are never</td>
<td>exceeded</td>
</tr>
<tr>
<td>Flexibility for how customers participate from 100% customer control to</td>
<td>fully automated</td>
</tr>
<tr>
<td>Customer opt-out ability is always preserved</td>
<td></td>
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<tr>
<td>Unlimited ways to group how customers are dispatched – only the assets</td>
<td>needed, where they’re needed</td>
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<tr>
<td>Real-time measurement &amp; verification of customer performance</td>
<td></td>
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<tr>
<td>Software constantly re-optimizing based on real-time results of over/under</td>
<td>performing customers</td>
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<tr>
<td>Entergy will be provided a user interface to view real time status of</td>
<td>assets</td>
</tr>
<tr>
<td>Technology agnostic &amp; future-proof to incorporate new and changing</td>
<td>technologies</td>
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# ASSET DIVERSITY

<table>
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<tr>
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<th>Water Heaters</th>
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<th>Chillers</th>
<th>HVAC</th>
<th>Comp. Air</th>
<th>Cooling Towers</th>
<th>PV &amp; Wind</th>
<th>CHP / CeGen</th>
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</tbody>
</table>
EVENT REPORTING

- Rich reporting database available to create custom reports for Entergy
- Flexibility to provide data at Virtual Power Plant level, specific geographies, sites, assets, etc.
- Real-time performance in UI
Evaluation, Measurement & Verification (EM&V)

- ENO's Third-Party-Evaluator, ADM, will have direct access to participant data
- QA/QC will be performed on a sampling of devices installed at participating facilities
- Program evaluation, participation levels, interviews and performance will inform forward-looking program planning
2018 INTEGRATED RESOURCE PLAN
POTENTIAL STUDIES REVIEW
Residential Demand Response Peak Load Reductions Summary

Assumptions:
- Optimal Energy study only*
- Scenario One (p.52)
- DLC/ADR programs only
- 2018-2020 forecast
- Load shed: 1 kW/thermostat and 0.5 kW/switch

*Navigant study showed potential residential demand response reduction after the first three years

<table>
<thead>
<tr>
<th>Entity</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
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<tbody>
<tr>
<td>Navigant</td>
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<td>Optimal Energy</td>
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<td>4</td>
<td>6</td>
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<tr>
<td>APTIM – BYOT</td>
<td>2.066</td>
<td>2.871</td>
<td>3.494</td>
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<tr>
<td>APTIM - DLC switch</td>
<td>.764</td>
<td>.623</td>
<td>.538</td>
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</table>
Small C&I Demand Response Peak Load Reductions Summary

Assumptions:
- Numbers based on 2018-2020 forecasts
- Optimal Energy numbers based on scenario two (only ADR), p.52
- Navigant numbers based on 48% of small C&I DR potential, pp.81-82
**Assumptions:**

- Took into consideration 2018-2020 and 2021-2024 forecasts.
- Optimal Energy numbers based on scenario two p.52
- Navigant numbers based on large C&I DR potential, p.81-82
BUDGET & SAVINGS
## PY10-12 SUMMARY BY PROGRAM YEAR

<table>
<thead>
<tr>
<th>Program Year</th>
<th>EM&amp;V</th>
<th>Program Costs</th>
<th>Total Budget</th>
<th>kW Target</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Year 10</td>
<td>$122,239</td>
<td>$1,758,335</td>
<td>$1,880,575</td>
<td>5,199</td>
<td>3,515</td>
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<tr>
<td>Program Year 11</td>
<td>$101,996</td>
<td>$1,467,145</td>
<td>$1,569,141</td>
<td>9,491</td>
<td>4,256</td>
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<tr>
<td>Program Year 12</td>
<td>$111,941</td>
<td>$1,610,201</td>
<td>$1,722,142</td>
<td>14,270</td>
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<tr>
<td>Totals</td>
<td>$336,177</td>
<td>$4,835,681</td>
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</table>
## PROGRAM YEAR 10

<table>
<thead>
<tr>
<th>Offering</th>
<th>EM&amp;V</th>
<th>Program Costs</th>
<th>Total Budget</th>
<th>kW Target</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residential - BYOT</td>
<td>$18,254</td>
<td>$262,569</td>
<td>$280,822</td>
<td>2,066</td>
<td>2,066</td>
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<tr>
<td>Residential - DLC</td>
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<td>$346,616</td>
<td>$370,713</td>
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<td>1,350</td>
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<tr>
<td>Small Commercial &amp; Industrial</td>
<td>$5,901</td>
<td>$84,880</td>
<td>$90,781</td>
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<td>87</td>
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<tr>
<td>Large Commercial &amp; Industrial</td>
<td>$73,988</td>
<td>$1,064,270</td>
<td>$1,138,258</td>
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<tr>
<td><strong>Total</strong></td>
<td>$122,239</td>
<td>$1,758,335</td>
<td><strong>$1,880,575</strong></td>
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</table>
## PROGRAM YEAR 11

<table>
<thead>
<tr>
<th>Offering</th>
<th>EM&amp;V</th>
<th>Program Costs</th>
<th>Total Budget</th>
<th>kW Target</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residential - BYOT</td>
<td>$19,600</td>
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<td>Small Commercial &amp; Industrial</td>
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<td>$793,745</td>
<td>$848,926</td>
<td>5,597</td>
<td>18</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$101,996</td>
<td>$1,467,145</td>
<td>$1,569,141</td>
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<td></td>
</tr>
</tbody>
</table>
## PROGRAM YEAR 12

<table>
<thead>
<tr>
<th>Offering</th>
<th>EM&amp;V</th>
<th>Program Costs</th>
<th>Total Budget</th>
<th>kW Target</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residential - BYOT</td>
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<td>$325,116</td>
<td>$347,719</td>
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<td>3,494</td>
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<tr>
<td>Residential - DLC</td>
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<tr>
<td>Small Commercial &amp; Industrial</td>
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<td>$118,765</td>
<td>$127,022</td>
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<td>607</td>
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<tr>
<td>Large Commercial &amp; Industrial</td>
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<td>$882,020</td>
<td>$943,338</td>
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<td>20</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$111,941</td>
<td>$1,610,201</td>
<td>$1,722,142</td>
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</table>
Green Light New Orleans

<table>
<thead>
<tr>
<th>Program Year</th>
<th>Light Bulbs Installed</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>90,254</td>
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<tr>
<td>2</td>
<td>61,984</td>
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<tr>
<td>3</td>
<td>68,428</td>
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<tr>
<td>4</td>
<td>46,277</td>
</tr>
<tr>
<td>5</td>
<td>35,877</td>
</tr>
<tr>
<td>6</td>
<td>8,178</td>
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<tr>
<td>7</td>
<td>4,770</td>
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<tr>
<td>8</td>
<td>3,341</td>
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<tr>
<td>9</td>
<td>830</td>
</tr>
<tr>
<td>Total</td>
<td>319,939</td>
</tr>
</tbody>
</table>

$76,781 budget remaining
QUESTIONS & DISCUSSION
CERTIFICATE OF SERVICE
Docket No. UD-17-03

I hereby certify that I have served the required number of copies of the foregoing report upon all other known parties of this proceeding, by the following: electronic mail, facsimile, overnight mail, hand delivery, and/or United States Postal Service, postage prepaid.

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Daniel Weiner  
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New Orleans, LA  70112

Monica Gonzalez  
Casius Pealer  
U.S. Green Building Council, LA Chapter  
P.O. Box 82572  
Baton Rouge, LA  70884
New Orleans, Louisiana, this 15th day of October, 2019.

__________

Harry M. Barton